

Before the holidays, we published two **FlexBulletins** on the need to radically rethink our approach to flexibility: [Farewell to FWAs?](#) and [The Next Frontier: Collaborative Scheduling](#). As we said in the preface to “**The Next Frontier**”:

*“One cannot ultimately achieve flexibility through practices or programs we would call “neo-rigidity.” For the next phase of flexibility to prosper, managers will need to upgrade their skills and become much more flexible managers and employees will need to strengthen their own collaborative skills. Broader forms of flexibility need to be developed, including a range of options for hourly workers and more hybrid forms for millennials and pre-retirees. Online systems will need to be enhanced with more robust menus, monitoring of success and automated coaching to support all users.”*

*Many clients and colleagues agree. We have developed, and they have favorably reviewed, our **Collaborative Scheduling System**. We briefly describe this 2012 model, this new vehicle for flexibility below. We encourage you to view its introductory tools and overview in our showroom, the [Rupert And Company](#) website. We would enjoy discussing its power and features with you.*

### **COLLABORATIVE TOOLS ARE THE BASIS for an inclusive Co Scheduling framework**

The shift from flexibility-as-program to flexibility-as-ongoing-collaboration both requires and offers broader, deeper and more diverse supports. A simple menu of 5 or 6 options with a business case, best practices and a proposal process can be enough to support a slowly growing number of exempt staff in modest forms of flexibility.

But this approach of the last decade or so, which we call an FWA system, has and has reached natural limits. The options are typically limited; the most likely approvers are those already predisposed to flexibility; and most users – once their arrangements are approved – are left to their own devices to succeed. The end result is a narrower universe for flexibility, one that is unlikely to satisfy growing employee demand and help drive us out of recession-level usage levels in the more expansive period ahead. It’s time for a change.

Trading in an old FWA system for a new, state-of-the-art Co Scheduling system will enable more flexible and effective flexibility. This innovative, supportive toolkit will offer managers, employees and HR champions ongoing guidance through these innovative elements:

- **MANY COLLABORATIVE SCHEDULES** rather than limited FWA menus
- **STRONG COLLABORATIVE SKILL SETS** in place of programs and checklists
- **LIFECYCLE TRAINING** (orientation → auto-coaching) instead of one-time tools
- **GUIDANCE ON COLLABORATING AT A DISTANCE**, not ad hoc support
- **FLEXING CHRONIC ILLNESS INTO WELLNESS** rather than forcing false choices
- **BUILDING A TOTAL MONITORING + MANAGEMENT SYSTEM**, not narrow tracking

We briefly describe these features below and will provide greater detail in future [Bulletins](#), in conversations with you and in select seminars in the months ahead.

### **MANY COLLABORATIVE SCHEDULES rather than limited FWA menus**

The essence of Co Scheduling is a broader range of people negotiating a more diverse set of customized options. The platform for innovation is the display of many proven options drawn from successful internal and external ways of working. The emphasis is less on traditional, narrow choices and more on targeted, even niche opportunities. The goal is more palette than menu – a call to experiment and innovate rather than to simply conform. Rethinking options also offers the opportunity to rename existing flexible practices in natural language, rather than what has become flex jargon. A few examples of options on a typical platform are:

- *Team Self-Scheduling* – a means for hourly team members to shape their own schedules
- *Fully Offsite Work* – typically working from home full-time (sometimes called “remote work”)
- *Shift Swapping* – the ability for shift workers to exchange schedules
- *One-time Change* – individually negotiated ad hoc changes in schedule or place of work
- *Phased Retirement* – full supports, not large programs to reduce schedules for older workers
- *Hybrids* – an important incubator for new options combining old and new elements

[You can see a fuller example at the [“Tools”](#) section of our website.]

Each of these options is supported by targeted implementation detail. Included are cost/benefit analyses, instructional best practice stories, skill assessment tools, self-paced online trainings and a basket of core collaboration skill trainings for managers and employees.

### ***STRONG COLLABORATIVE SKILL SETS in place of programs and checklists***

Best practice guidance is provided for all designated Co Scheduling options. But truly successful implementation is based on and strengthened by the evolving collaborative skills of participants. These key skills, valuable beyond this setting and meeting the expressed requirements of millennials and others, are emphasized at various points in the Co Scheduling system. Several key skills are emphasized for managers and employees, since each requires reciprocity from the other:

- **Direction** Clarifying and modifying measurable work and required outcomes
- **Feedback** Creating a consistent, constructive and developmental feedback system
- **Communication** Designing and maintaining engaging communication systems
- **Development** Building credible pathways that combine flexibility and advancement

### ***LIFECYCLE TRAINING (orientation → auto-coaching) instead of one-time tools***

If it is the skills and behaviors above, rather than glossy programs that assure successful flexibility, then they must be more than a checklist of desirable manager traits. They are the heart of Collaborative Scheduling, just as arrangements are the essence of an FWA approach. Every component of a Co Scheduling approach reinforces this skill articulation and skill-building process. Among the training elements placed throughout the system are:

- **Self-Assessments** Weighted skill assessments for managers and employees, which direct participants to areas for improvement
- **Collaborative Skills** A set of these skill development exercises with individual modules is placed within the Co Scheduling toolkit.
- **Implementation Training** Information and success factors are embedded in online trainings that are one-stop launch tools for a variety of options
- **Monitoring & Coaching** As we describe below, our robust monitoring and coaching system observes all collaborations and applies unique automated coaching to build skills

In the course of launching an initiative, the system may benefit from live executive briefings, HR Business Partner trainings and other skill sessions as needed.

### ***GUIDANCE ON COLLABORATING AT A DISTANCE, not ad hoc support***

As you can see in our tool preview of [Collaborative Scheduling](#) the system supports 3 variants of such scheduling. Many companies now find their managers supporting full-time or part-time offsite workers as well as what can be called “distant employees”. These direct reports are typically located in another office, state or country.

While there are similarities in managing “telecommuters” and these distant employees, there are significant skill and practice differences that must be addressed. And while some companies may have relevant resources available, the integration of current or new materials into the Co Scheduling site makes sense. Best practice and skill building modules based on our **Leading through Mutual Respect** framework build success for these carefully defined ways of working.

### ***FLEXING CHRONIC ILLNESS INTO WELLNESS rather than forcing false choices***

The more expansive framework of Collaborative Scheduling allows true flexibility to be applied to unique situations. Flexibility is not only for healthy office-dwellers who want to work from home occasionally. It is needed in many forms by a broad array of employees who encounter and wrestle with chronic illnesses ranging from cancer to musculoskeletal injury.

The alternating need for time off, part-time, work at home and other schedules requires strong Co Scheduling skills on both the manager and employee’s parts. The **Collaborating Back to Wellness** section of this tool provides intensive skill training and best practice modules to support those who need a “crash course” in Co Scheduling. Among the situations they may confront are:

- **Cancer** – requiring intermittent absence, part-time, offsite work thru treatment and recovery
- **Heart Attack** – major absence, home-based and graduated return to work
- **Stroke** – return to wellness from stroke requires a profile similar to that from heart attack
- **Musculoskeletal Injury** – injuries, including back, need frequent absence of diverse lengths
- **Diabetes** – over many years may require offsite work, reduced schedules and flexible hours
- **Arthritis** – challenges and options that support diabetes can also apply to arthritis

We recognize that chronic conditions disrupt both work and home schedules and pose challenges for caregivers. The system includes access to the complementary **CareCircle®** -- a private social networking tool that allows group scheduling of medical appointments, food delivery and other tasks.

***BUILDING A TOTAL MONITORING + MANAGEMENT SYSTEM, not narrow tracking***

A continuing weakness of FWA systems is that the greatest energy goes into design/build/launch. When it comes to actually implementing a range of flexible schedules over time, they may be tracked, but individual employees and managers are left largely to their own devices. Just as the Co Scheduling system focuses heavily on skill and method development, it does not settle for narrow tracking – it creates a robust database to use for identifying outcomes such as satisfaction, success and options at risk. It offers at least the following functionalities:

- **Automated Registration** – the system automates the proposal or registration process, allowing contact info and full lifecycle management of many collaborative schedules
- **Success Tracking** – in the first three to six months of any collaborative schedule, essential skill and outcomes are probed to identify challenges and satisfaction of both participants
- **Auto-coaching** – Identified issues, and topics for periodic reminder or reinforcement, are communicated via emails that contain brief training modules or other training resources
- **Spot Surveying** – Brief, periodic assessments of employee and manager satisfaction, customer acceptance and related outcomes can be conducted
- **Evaluations** – Goals identified in any collaborative schedule can be expressed as part of a standard set, and those can inform periodic evaluations that lead to accumulated themes
- **Success Stories** – Unusually positive evaluations can provide candidates for success stories built from a template provided to the employee and manager

*Collaborative or Co Scheduling is a complete, innovative vehicle that offers significant “new model” features for organizations seeking a more effective approach to flexibility. As with any new model, it comes with core features and optional elements. Co Scheduling is a customizable approach. If all or part of this system could meet your needs, we would enjoy discussing the possibilities with you.*

[www.rupertandcompany.com](http://www.rupertandcompany.com)

Best regards,  
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